

House of Commons

Education Select Committee

The impact of COVID-19 on education and children's services

Written evidence from the British Council

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1. Summary

- 1.1 The British Council's higher education programmes support policy and system development, alignment between the UK and overseas HE systems and institutional partnerships. We provide insight and analysis on effective and inclusive approaches to education and promote professional development and student mobility to and from the UK. In science and research, we build capacity and support knowledge exchange and outreach in emerging nations.
- 1.2 COVID-19 presents significant challenges to UK higher education institutions (HEIs), many of which are both very internationalised and highly reliant on international students. These include current and future travel restrictions, issues related to demonstrating sufficient English competency to gain a visa and students' concerns about personal safety and whether they will gain the full international student experience if they come while social distancing measures are still in place or if all or part of their courses are conducted remotely.
- 1.3 The British Council is supporting universities and colleges to encourage existing international students to continue their studies and to recruit the next cohort and envisage playing a significant role in the recovery of the HE sector – something welcomed by universities themselves. Through Study UK, we continue to promote the UK as the best place to study and to reassure students about their safety. Our IELTS team are working with the sector to enable English language assessments required for student visas to proceed where in-person testing is not possible.

2. The value of international students

- 2.1 The UK HE sector is, after the USA, the second most popular global destination for international students. Working with HMG and the Devolved Administrations, the British Council plays a central role in enabling the sector to build and develop international connections, attract international students and develop mutual understanding between education systems. This builds trust in UK educational institutions and the attractiveness of the UK more broadly, which creates further opportunities for cultural, educational and economic engagement with the UK.
- 2.2 International students bring a net value of over £20bn to the UK, with each UK Parliamentary Constituency seeing an average of £31.3m net economic benefit from these students.¹ International students, whose fees are uncapped, also subsidise both the cost of educating UK students and carrying out research. The value of this cross-subsidy for research is around £1.4bn per year.²
- 2.3 Moreover, international students enrich the university experience for all students, including those from the UK, adding to the dynamism and diversity of the campus experience and keeping some key courses (particularly STEM masters) viable. International students also form an important part of the pipeline for our research base.
- 2.4 Upon graduation, international alumni serve as “informal ambassadors for the UK” , boosting UK soft power and the global attractiveness of the UK.³ The British Council has gathered some inspiring examples through the GREAT [Alumni Awards](#).⁴ Alumni [networks](#) also support enhanced trade and other connections between the UK and countries around the world and play an essential role in promoting trust in the UK, “leading to perceptions of the UK as a desirable partner in

¹ Higher Education Policy Institute and Kaplan International (2018), *The costs and benefits of international students by parliamentary constituency* <https://www.hepi.ac.uk/wp-content/uploads/2018/01/Economic-benefits-of-international-students-by-constituency-Final-11-01-2018.pdf> [Accessed 26 May 2020]

² As of 2017

³ The British Council, *Study UK Alumni Awards*, <https://study-uk.britishcouncil.org/alumni-awards>; and Department for Business, Innovation and Skills (2013), *The Wider Benefits of International Higher Education in the UK*, p. xii, [Accessed 26 May 2020]

⁴ The British Council, *Study UK Alumni Awards*, <https://study-uk.britishcouncil.org/alumni-awards>; and Department for Business, Innovation and Skills (2013), *The Wider Benefits of International Higher Education in the UK*, p. xii, [Accessed 26 May 2020]

potential trade, diplomatic or developmental relationships”.⁵ Those who have engaged culturally with the UK are twice as likely to seek to study in or economically engage with the UK.⁶ The experience of international students therefore plays a direct role in driving investment in and trade with the UK.⁷

3. The role of the British Council in supporting international student recruitment

- 3.1 The British Council plays a central role in supporting the UK’s HE sector, including through the recruitment of international students to the UK. Study UK is the education strand of the GREAT campaign which promotes the UK’s higher education provision to global markets, and currently concentrated in six key ODA markets (China, India, Malaysia, Thailand, Pakistan and Indonesia). Run by the British Council, Study UK is jointly funded by HMG and the British Council (£3m from each). Study UK is at the heart of the Department for Education’s and Department for International Trade’s International Education Strategy. The 2018 strategy sets the ambition of increasing the value of UK education exports to £35bn a year, with the aim of recruiting 600,000 international students a year.
- 3.2 British Council survey data shows that, of newly enrolled international students, that 67% had heard of the British Council before enrolment and one in ten had heard of the GREAT Campaign and Study UK, with over two thirds of those taking actions to find out more and directly engage with Study UK.
- 3.3 The British Council also plays an important role in helping UK students study internationally, both as the UK’s joint National Agency for Erasmus+ (along with Ecorys), and through programmes to help British people study abroad such as Study USA and Study in China.⁸ Through Erasmus+ we support approximately 18,000 UK students to study or work abroad, 10,000 UK vocational education and training students to gain placements abroad and 6,000 school pupils to take part in exchange programmes each year. Of those participating in Erasmus+, 90% reported improvement in their ability to interact with others and over half reported improvements in their digital skills.⁹ Generation UK, of which Study in China is a central part, launched in 2013 and is on course to help 80,000 students boost their skills and long-term employability through work experiences in China by the end of 2020.¹⁰

4. The impact of COVID-19 on UK universities

- 4.1 The COVID-19 pandemic poses considerable challenges to UK HE institutions. The most immediate challenge is around student recruitment for the 2020/21 academic year. It is widely

⁵ Department for Business, Innovation and Skills (2013), *The Wider Benefits of International Higher Education in the UK* https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/240407/bis-13-1172-the-wider-benefits-of-international-higher-education-in-the-uk.pdf [Accessed 26 May 2020]

⁶ Research shows that trust in a country is associated with a greater intent to visit, study and do business. 75% of people surveyed who had participated in a UK cultural relations activity with British Council said they trusted the UK, compared to only 49% of people who had not, a 53% increase in trust. 15% of people who said they trust the UK said they intend to do business or trade with the UK, compared to only 8 per cent who said they distrust the UK, an 87.5% increase – British Council (2018), *The Value of Trust*. Available online at: https://www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf [Accessed on 26 May 2020]

⁷ The link between trust in the UK and a propensity to do business or trade with the UK is particularly pronounced across a number of key markets. In both China and Turkey, those who trust the UK are almost three times as likely to intend to do businesses or trade with the UK; in the USA and South Korea trusting the UK doubles the likelihood of intending to trade or do business with the UK, with similar trends found in Australia, France, Saudi Arabia and Italy. Trust in the UK increases the propensity of those surveyed in India to trade with or invest in the UK by almost 45%.

British Council (2018), *The Value of Trust*, p. 15 Available online at: https://www.britishcouncil.org/sites/default/files/the_value_of_trust.pdf [Accessed on 26 May 2020] For full figures please see Annex 2

⁸ The British Council, *Study USA, 25 Years of Success*, <https://nireland.britishcouncil.org/programmes/education/study-usa>; and *Study in China* <https://www.britishcouncil.org/study-work-abroad/outside-uk/study-china> [Accessed 26 May 2020]

⁹ Publications Office of the EU (2019), *Erasmus+ higher education impact study*, <https://op.europa.eu/en/publication-detail/-/publication/94d97f5c-7ae2-11e9-9f05-01aa75ed71a1/language-en> [Accessed 26 May 2020]

¹⁰ *Study in China* <https://www.britishcouncil.org/study-work-abroad/outside-uk/study-china> [Accessed 26 May 2020]

expected that fewer international students will enrol in UK HE institutions than would have otherwise been expected as a result of the COVID-19 pandemic.¹¹

- 4.2 The uncertainties around ongoing global lockdowns present a number of obstacles for UK HE institutions. There are challenges around the travel regimes that will be in place as the new academic year commences, both here and in domicile countries, such as quarantine requirements and the resumption of air travel. There are further uncertainties about the impact of a global recession and the affordability of international study for a potentially shrinking global middle class.
- 4.3 There have also been a number of surveys which suggest that many students may choose to defer their studies, study for an overseas degree from home or in a nearby country, rather than come to the UK. For example, a survey conducted by Quacquarelli Symonds (QS) has shown that students have increased concerns about international travel. In February, 27% of international students stated that COVID would restrict their international study plans, and this increased to 57% in April.¹²
- 4.4 A downturn in international student recruitment will likely have a significant financial impact on the sustainability of many UK HE institutions. Recently published British Council research shows that the shortfall in international students from East Asia alone could leave UK Universities facing a £463million financial shortfall in the coming academic year, with nearly 14,000 fewer new enrolments from East Asia expected in 2020-21 compared to the 2018-19 academic year. These findings suggest a 12% decline in the number students choosing to study in the UK and demonstrate the challenges that COVID-19 presents to the finances of the UK HE sector.¹³
- 4.5 HMG have introduced a package of support for UK HE providers and institutions, to boost support for students, stabilise the admissions system and ease pressures on universities' finances.¹⁴ This has seen £2.6bn in tuition fee payments brought forward, £100m in direct funding to support research into this academic year, as well as confirmation that the sector is eligible to access wider support packages for the economy – which some estimate could be worth up to £700m for the sector – as well as flexibility around the admissions system to stabilise the situation.¹⁵
- 4.6 Nonetheless, additional support may be required to ensure their survival in both the short term, and, if the international student recruitment market takes a number of years to recover, the longer-term as well. Universities UK cited a fall in international student income as among the primary financial risks facing HE institutions in 2020/21. They calculate that a 100% fall in fee income from international students would result in a direct £6.9bn loss of income, with significantly larger losses following from the absence of income from residences, and other incidental spending on campus.
- 4.7 The British Council has carried out a number of surveys to ascertain the attitudes of current and prospective international students towards studying abroad and in the UK.¹⁶ Among the primary

¹¹ The British Council (2020) *HE institutions face 'battle' for Chinese students as 39 per cent of applicants unsure about cancelling study plans*, <https://www.britishcouncil.org/contact/press/higher-education-chinese-students-covid-report>; and The British Council (2020), *COVID-19 Update: India and Pakistan*, 23 April <https://vimeo.com/412148382> [Accessed 26 May 2020]

¹² Quacquarelli Symonds (2020), *How International Students are Responding to COVID-19* <https://www.qs.com/how-international-students-are-responding-to-covid-19/> [Accessed 26 May 2020]

¹³ Following on from recent student surveys in China, India and Pakistan on the impact of Covid-19, the British Council polled a further 15,536 students with outbound study plans across eight East Asia markets: Mainland China, Hong Kong, Indonesia, Malaysia, Singapore, Taiwan, Thailand and Vietnam. These eight markets represent 52% of the new non-EU students in UK HE institutions 2018/19. The £464million decline in revenue results from lost spending on tuition and living expenses. The British Council (2020), *UK universities face at least a £463 million shortfall in coming academic year*, <https://www.britishcouncil.org/organisation/press/uk-universities-face-least-%C2%A3463-million-shortfall-coming-academic-year#:~:text=UK%20universities%20will%20likely%20have,British%20Council's%20International%20Education%20Services>. [Accessed 12 June 2020]

¹⁴ Department of Education, *Government support package for universities and students*, press release, May 2020 <https://www.gov.uk/government/news/government-support-package-for-universities-and-students> [Accessed 22 June 2020]

¹⁵ Department for Education, *Government support package for universities and students*, May 2020 https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/882884/Government_support_package_for_higher_education_providers_and_students.pdf

¹⁶ The British Council (2020) *HE institutions face 'battle' for Chinese students as 39 per cent of applicants unsure about cancelling study plans*, <https://www.britishcouncil.org/contact/press/higher-education-chinese-students-covid-report> and <https://education-services.britishcouncil.org/insights-blog/covid-19-update-china-survey-results> [Accessed 26 May 2020]

reasons cited by Chinese students for concerns about applying to the UK, 79% stated they had concerns about their health and well-being, and 87% indicated concerns about their personal safety.¹⁷ These joint concerns among Chinese students about UK public health and their safety suggest that international perceptions about the UK public health response to COVID-19, as well as concerns about the attitude towards China and those of Chinese origin could prove obstacles to the recruitment of Chinese and other international students. China is the largest single country group of international students in the UK, and they make a direct economic contribution to the UK of around £4bn a year.

- 4.8 Studies carried out in India and Pakistan suggest similar concerns, with 28% of Pakistani students and 24% of Indian students describing themselves as “likely” to change their study plans next year. However, 57% of Indian students and 52% of Pakistani students said they were unlikely or not at all likely to change their plans.¹⁸
- 4.9 These surveys show that there is a window of opportunity over the next two months to create a greater sense of certainty about the upcoming academic year. If responses are clear and quickly communicated to students – with the British Council serving a key role in communicating any such assurances – then the UK HE sector will face a much more manageable scenario than would otherwise be the case.

5. How the British Council is supporting UK HE during COVID-19

Support for UK HEIs

- 5.1 The British Council has taken a number of steps to both support those currently studying in the UK – both those unable to return home due to the pandemic and those seeking to continue their studies from their home country – and to bolster student recruitment for next year.
- 5.2 We continue to run rolling surveys to measure the sentiment of international students through our International Education Service. These IES surveys have assisted UK Universities as they formulate their response to the pandemic and plan for next year.¹⁹ Furthermore, on the Study UK webpage we have created a dedicated channel for UK institutions to share the latest updates with current and potential international students. We partnered with UUKi, UKCISA and BUILA on the #WeAreTogether campaign and with UUKi on their Covid-19 international insights and resources [website](#) and are now rolling out a #ReadyForYou campaign, targeted at key markets to i) reaffirm that the UK is an open, trustworthy and safe study destination, ii) rebuild confidence and trust among students, agents and counsellors, and iii) regain any students who may have been considering alternative options to the UK.²⁰ Our new “Starting your degree in 2020” information webpage has received over 4,000 unique visits since its launch and ensure prospective students are kept up to date with key information ahead of their forthcoming studies in the UK.
- 5.3 In May 2020 we launched the Education Futures online mini-conference series to provide insights on the impact of COVID-19 to UK HE institutions working in East Asia. Alongside this and frequently in partnership with HMG and HE sector bodies we have run a series of webinars for the UK sector on the impact of COVID-19 on international students recruitment and transnational education. This has also served to establish direct connections between various HE institutions

¹⁷ The British Council (2020) *HE institutions face ‘battle’ for Chinese students as 39 per cent of applicants unsure about cancelling study plans*, <https://www.britishcouncil.org/contact/press/higher-education-chinese-students-covid-report> and <https://education-services.britishcouncil.org/insights-blog/covid-19-update-china-survey-results> [Accessed 26 May 2020]

¹⁸ The British Council (2020), *COVID-19 Update: India and Pakistan, 23 April* <https://vimeo.com/412148382> [Accessed 26 May 2020]

¹⁹ The British Council (2020), *COVID-19: Survey results* <https://education-services.britishcouncil.org/insights-blog/covid-19-update-china-survey-results> [Accessed 26 May 2020]

²⁰ Universities UK and the British Council (2020, with ongoing updates), *Covid-19 international insights and resources* <https://www.universitiesuk.ac.uk/International/Pages/Covid19-international-insights.aspx> [Accessed 26 May 2020]

and created a platform and forum in which best practice, insights and innovations can be shared within the sector, and with HMG.

- 5.4 We have also taken steps to support Education Agents, providing them with a toolkit which includes advice for students applying for courses in 2020, including the latest information on preparing to study in the UK and student safety and wellbeing. We've also included information and resources about the UK, the new Graduate Route and completing course application forms. Similarly, we have created a tailored information pack, which is updated as appropriate, for education councillors, ensuring that they are able to provide students with accurate, accessible and useful information regarding future studies in the UK.
- 5.5 To study in the UK international students must demonstrate English language proficiency. The British Council's International English Language Testing System (IELTS) was a highly regarded way to do this. COVID-19 has resulted in the postponement or cancellation of many IELTS examinations as we have been forced to close around 90% of our international English teaching and examination centres to protect the health and safety of both British Council staff and students.
- 5.6 This has led to considerable uncertainty around whether students could meet the language proficiency requirement in time to get a visa to begin studying in the Autumn.
- 5.7 In response to this we have launched the [IELTS Indicator](#), a home based English language test for those who are currently unable to sit an IELTS exam due to COVID-19 restrictions.²¹ The online IELTS indicator is an interim test for those who wish to study abroad, or online, and continue with their application process. The IELTS Indicator test replicates the format of the IELTS Academic test taken in test centres, and UK HE institutions can choose to use the IELTS Indicator test for their own application purposes (i.e. institutions' self-assessment of English language ability). This allows UK HE institutions to continue with the application process of international students.
- 5.8 The IELTS Indicator is not intended to replace IELTS and will be withdrawn as and when in-person IELTS can resume at scale. IELTS Indicator has launched in countries where IELTS testing has been suspended due to Covid-19, and bookings opened on 22 April.

Support for students

- 5.9 The Study UK website has become a key source of regularly updated information and reassurance, for both current and prospective international students. We are reaching student recruiters and current and potential students themselves through social media, with targeted campaigns. We are also hosting a series of [virtual fairs](#), starting in China.²² Our COVID-19 students page has received over 34,000 unique visits since it was launched in February, proving an essential resource in keeping current and prospective international students up to date on all developments.
- 5.10 We are running a series of webinars for those graduating this year – both for UK and international students – who will be among those most acutely impacted by the necessary closure of in person activity in HE institutions, to support their career development. We aim to build a digital 2020 alumni network with 30,000 members by March 2021.

What that support will look like in the future

- 5.11 We are working with the Department for Education and the Department for International Trade on the 2021-25 update to the International Education Strategy. The COVID-19 pandemic underscores the importance of these updates, where we hope to secure additional funding to expand Study UK

²¹ The British Council, *IELTS Indicator*, <https://takeielts.britishcouncil.org/take-ielts/which-ielts-test/ielts-indicator> [Accessed 26 May 2020]

²² The British Council (2020), *Upcoming Events IES as of 26 May 2020*, <https://education-services.britishcouncil.org/exhibitions-events/exsport> [Accessed 26 May 2020]

to non-ODA countries, particularly across the EU as students from those countries become eligible for full international fees. The need for such reform is made particularly acute by the COVID-19 pandemic given the potential of reduced international students in 2020/21 and potentially beyond. Both departments see the Study UK campaign as critical in driving up international student recruitment.

- 5.12 A large number of international students who receive UK educational qualifications do so overseas through transnational education (TNE). There are around one and a half times as many students studying for UK degrees overseas via TNE than there are studying in person in the UK.
- 5.13 COVID-19 is likely to increase the number of students seeking UK qualifications in this manner as the ability to travel internationally becomes curtailed. The potential for prolonged travel restrictions, along with a potentially decreased desire to travel due to global public health concerns among prospective students, is likely to spur an increased shift towards online or blended learning.
- 5.14 Our [research](#) suggests that that the UK is well-placed to drive and capitalise on this trend towards remote/blended/online education due to the large number of overseas teaching and research partnerships that UK HE institutions already have in place.²³ This gives the UK a head start when it comes to building further partnerships and reaching into new markets. Developing further partnerships with overseas universities also [build capacity and improve quality](#) at home and abroad in both HE and Technical and Vocational Education and Training. Indeed, they are a very effective way of developing higher education capacity in less developed countries and supporting wider development goals such as women and girls' education.
- 5.15 The British Council uses its relationships with overseas governments, and the insights from its global network to help open up new markets for UK transnational education by working with policymakers to deliver policy and regulatory change, including the recognition of UK qualifications of overseas.²⁴ We foresee further opportunities in this area as a result of the COVID-19 pandemic and will seek to support UK HE institutions as they expand their work.

6. The impact of COVID-19 on the British Council

- 6.1 The pandemic has had a significant impact on the British Council's financial situation, as it has the financial sustainability of many organisations across the cultural and creative sectors. COVID-19 has resulted in over 90 per cent of the British Council's global teaching and exams facilities closing, with a severe impact on the organisation's finances, reducing cash flow and income to critical levels. The Foreign and Commonwealth Office has provided £26m of grant income and a further £60m loan to help cover operational costs in the short term. Constructive conversations with the FCO, our sponsor department, continue as we work together to try and find an effective, sustainable, long-term solution.

7. Conclusion

- 7.1 The British Council are deeply involved in supporting the recruitment of international students to the UK, particularly through the Study UK portion of the GREAT Campaign. The British Council have worked to support UK HE institutions and students through the COVID-19 pandemic. Activity has included ensuring proper information sharing; running effective and innovative digital campaigns to support student recruitment, such as virtual fairs and social media campaigns; and taking steps to ensure language proficiency can be properly assessed by UK HE institutions, allowing student

²³ The British Council (2020), *Knowledge Centre, Transnational Education*, <https://www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education> [Accessed 26 May 2020]

²⁴ The British Council (2020), *Knowledge Centre, Transnational Education*, <https://www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education> [Accessed 26 May 2020]

recruitment to continue despite the challenges of language assessment posed by the global pandemic.

- 7.2 The British Council will continue to work closely with HM Government and UK HE institutions to support the sector and students through the ongoing pandemic and the subsequent recovery.

8. Context: The British Council

- 8.1 The British Council is the UK's international organisation for cultural relations and educational opportunities. We create friendly knowledge and understanding between the people of the UK and other countries. We do this by making a positive contribution to the UK and the countries we work with – changing lives by creating opportunities, building connections and engendering trust. This enhances the security, prosperity and influence of the UK and, in so doing, helps make the world a better, safer place.
- 8.2 We work on the ground in more than 100 countries. In 2019-20 we connected with 80 million people directly and with 791 million overall, including online and through our broadcasts and publications.

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